

## DEPARTMENT OF HEALTH SERVICES

14/744 P STREET

CRAMENTO, CA 95814

July 15, 1985



To: All County Welfare Directors  
County Administrative Officers

Letter No. 85- 53

REESE V. KIZER (COMMUNITY PROPERTY DIVISION OF INCOME WHEN  
ONE SPOUSE IS IN LTC)

This is to provide you with instructions for immediate implementation of a stipulated agreement pending appeal of the subject litigation.

Background:

In 1983 legislation (AB 1667, copy attached) was enacted which required recognition of the community property division of income when one spouse is in LTC and the other spouse resides at home, if federally permissible. The law was not implemented because the Department of Health and Human Services (DHHS) had indicated that such a division conflicts with federal law.

Reese v. Kizer (Alameda Superior Court) was initiated because AB 1667 has not been implemented. On April 29, 1985 a preliminary injunction was issued ordering the Department to implement a portion of the law. The Department filed an appeal which automatically stayed the injunction. Pending the appeal decision, we have entered into a stipulated agreement with the Plaintiffs to determine the shares of cost in accordance with subdivision (a) of AB 1667, in those instances where the applicant, beneficiary or person acting on behalf of an applicant/beneficiary requests such an action.

Instructions

Advise your staff to take the following actions immediately upon request by an LTC applicant, beneficiary or person acting on behalf of an LTC applicant/beneficiary. A request shall be a written or verbal reference to any of the following:

1. Reese v. Kizer
2. AB 1667
3. Section 14005.16, Welfare and Institutions Code, or words to that effect.
4. Community property division of income, or words to that effect.

Counties are under no obligation to advise applicants or beneficiaries that these instructions may apply in their case. Eligibility staff should apply these instructions only upon request; in all other instances existing regulations should be applied. Eligibility staff should explain to the persons requesting consideration of the division of community income that such consideration may only be temporary pending resolution of the litigation.

A.    Affected Population

The only persons affected by the agreement are persons in long-term care who:

1.    Have spouses residing at home; and
2.    Are in their own MFBUs in accordance with existing regulations (22, CAC, Section 50377).

B.    Determination of Community Property Ownership

All unearned income received by the LTC spouse and all income (earned and unearned) received by the at-home spouse should be presumed community property income unless this presumption is rebutted by one of the spouses.

C.    Determination of the Amount of Community Property Unearned Income of the LTC Spouse Protected for the Spouse Living at Home

1.    Identify the community property unearned income received by the LTC spouse.
2.    Identify the community property income (earned and unearned) of the at-home spouse.
3.    Combine the amounts determined in steps 1 and 2 and divide this sum by 2.
4.    Compare the amount determined in step 3 to the amount of the total community property income received by the at-home spouse (step 2). If the at-home spouse's income (step 2) is equal to or greater than the amount determined in step 3, the at-home spouse's community property interest is adequately protected and no further action need be taken to implement AB 1667. However, if the income received by the at home spouse is less than the amount determined in step 3, the

All County Welfare Directors    -3-  
County Administrative Officers

difference must be treated as income of the at-home spouse and is not to be considered when determining the long-term care spouse's share of cost.

A worksheet is attached for use in calculating the community property income protection. Also included are examples of share-of-cost calculations. Please note that the allocation provisions of Title 22, CAC, Section 50563 are applied after calculating the community property income protection.

If you have any questions please contact Ruthell Ussery of my staff at (916) 324-4970.

Sincerely,

Original signed by

Doris Z. Soderberg, Chief  
Medi-Cal Eligibility Branch

cc: Medi-Cal Consultants  
Medi-Cal Program Consultants

Expiration Date: July 15, 1986

Assembly Bill No. 1667

CHAPTER 1031

An act to add Section 14005.16 to the Welfare and Institutions Code, relating to Medi-Cal.

[Approved by Governor September 21, 1983. Filed with Secretary of State September 22, 1983.]

LEGISLATIVE COUNSEL'S DIGEST

AB 1667, Connolly. Medically needy persons.

Existing law provides that one of the services covered under the Medi-Cal program is care received in skilled nursing or intermediate care facilities.

Existing law provides for the medically needy category of eligibility under the Medi-Cal program, under which persons who would qualify for specified public assistance programs but for their income or resources are still eligible for Medi-Cal if they have insufficient income to pay for the cost of health care. Under this category, however, individuals may be required to pay a share of costs in order to fulfill eligibility requirements.

This bill would provide that the community property interest of a noninstitutionalized spouse in the unearned income of the other spouse shall not be considered as available income to the spouse living in a skilled nursing facility or intermediate care facility for purposes of determining Medi-Cal eligibility if the spouses are not in the same Medi-Cal budget unit.

The bill would further specify that the community property interest of the institutionalized spouse in the unearned income of the noninstitutionalized spouse would be deemed as available income to the institutionalized spouse.

The bill would further provide that any federal waivers necessary in order to implement provisions of this act shall be sought by the State Department of Health Services, but that failure to obtain any necessary waivers shall not affect implementation of any provisions for which waivers are not necessary or for which waivers are obtained.

The bill further provides that the provisions of the act shall be implemented pursuant to adoption of emergency regulations.

*The people of the State of California do enact as follows:*

SECTION 1. Section 14005.16 is added to the Welfare and Institutions Code, to read:

14005.16. (a) In determining the eligibility of a married individual, pursuant to Section 14005.4 or 14005.7, who resides in a skilled nursing facility or an intermediate care facility, and who is in

a Medi-Cal family budget unit separate from that of his or her spouse, the community property interest of the noninstitutionalized spouse in the unearned income of the married individual shall not be considered income available to that individual.

(b) In determining the eligibility of a married individual pursuant to Section 14005.4 or 14005.7 who resides in a skilled nursing facility or an intermediate care facility, and who is in a Medi-Cal family budget unit that does not include his or her spouse, the community property interest of the institutionalized individual in the unearned income of the noninstitutionalized spouse shall be considered income available to that individual.

SEC. 2. (a) Any provision of this act that is in conflict with any federal statute or regulation shall be inapplicable to the extent of such conflict, but the provision and the remainder of the provisions shall be unaffected to the extent no conflict exists.

(b) The State Department of Health Services shall, within 30 days of the operative date of this act, seek all federal waivers necessary to implement the provisions. The provisions for which appropriate federal waivers cannot be obtained shall not be implemented, but provisions for which waivers are either obtained or found to be unnecessary shall be unaffected by the inability to obtain federal waivers for the other provisions.

(c) The State Director of Health Services shall, within 30 days of obtaining all necessary federal waivers, adopt regulations implementing the provisions as emergency regulations in accordance with the provisions of Chapter 3.5 (commencing with Section 11340) of Part 1 of Division 3 of Title 2 of the Government Code. For the purposes of Chapter 3.5 (commencing with Section 11340) of Part 1 of Division 3 of Title 2 of the Government Code, the adoption of the regulations shall be deemed to be an emergency and necessary for the immediate preservation of the public peace, health and safety, or general welfare. Notwithstanding the provisions of Chapter 3.5 (commencing with Section 11340) of Part 1 of Division 3 of Title 2 of the Government Code, emergency regulations adopted by the State Department of Health Services in order to implement the provisions shall not be subject to the review and approval of the Office of Administrative Law. These regulations shall become effective immediately upon filing with the Secretary of State.

(d) If any provision of this act or the application thereof to any person or circumstances is held invalid, such invalidity shall not affect other provisions or applications of the act that can be given effect without the invalid provision or application, and to this end the provisions of this act are severable.

- |                                                                                                 |  |
|-------------------------------------------------------------------------------------------------|--|
| 1. Community Property<br>Unearned Income<br>LTC Spouse                                          |  |
| 2. Community Property<br>Income At Home Spouse<br>\$ <u>          </u> + \$ <u>          </u> = |  |
| 3. Total (Add lines 1 & 2)                                                                      |  |
| 4. Each Spouse's<br>Community Interest<br>(line 3 - 2)                                          |  |
- 
- A. If line 2 is equal to or greater than line 4, the at-home spouse's community property interest is adequately protected.
- A1. Use the amount in line 2 plus any separate income of at-home spouse when determining SOC of at-home spouse and allocation from LTC spouse pursuant to 22 CAC Section 50563.
- A2. Use the amount in line 1 plus any earnings and separate income of LTC spouse when determining LTC SOC.
- B. If line 2 is less than line 4 the at-home spouse's community property interest is not adequately protected.
- B1. Use the amount in line 4\* plus any separate income of at-home spouse when determining SOC of at-home spouse and allocation from LTC spouse pursuant to 22 CAC Section 50563.
- B2. Use the amount in line 4 plus any earnings and separate income of LTC spouse when determining LTC SOC.

\* If the at-home spouse has earnings, the earned and unearned portions of line 4 must be identified to enable the proper income deductions to be applied. (See example 2).

Example 1:

\$800        unearned income is received in the name of the LTC spouse\*

\$-0-        is received in the name of the at-home spouse who is not linked to a Medi-Cal program.

1.	Community Property Unearned Income of LTC Spouse	\$800
2.	Community Property Income of at-home Spouse	\$ $\frac{-0-}{\text{Earned}}$ + \$ $\frac{-0-}{\text{Unearned}}$ \$-0-
3.	Total	\$800
4.	Each spouse's interest	\$400

\* entered LTC last month

EXHIBIT 15-1

County District County Use

Application ☐ Redetermination ☐ Change ☐ Retroactive Elig. ☐ Correction

Effective Eligibility Date for this Budget

Mo. Yr.

State Number		Pers.		Name - First, Middle, Last		Birthdate		Sex	(1) Social Security No. and (2) Health Insurance Claim No. or Railroad Retirement No.	Other Cover
c	7 Digit Serial No.	MFSU No.				Mo.	Day	Yr.		
				LTC Spouse					(1) .....	
									(2) .....	
									(1) .....	
									(2) .....	
									(1) .....	
									(2) .....	
									(1) .....	
									(2) .....	
									(1) .....	
									(2) .....	
									(1) .....	
									(2) .....	

ome of MFBU members applying as aged,  
nd, or disabled plus income of spouse or  
ent (except PA or other PA)

II. Income of MFBU members not listed in I.  
(except PA or other PA)

III. Share of cost computation

NONEXEMPT UNEARNED INCOME

A. NONEXEMPT UNEARNED INCOME

1. Countable income from I, 18

380

2. ABD-MN

1. Social Security

2. Countable income from II, 11

0

3. Social Security

2. Net Income from  
Property

3. Total countable eligibility  
income (add 1 and 2)

380

4. Income  
from Property

3. Other—itemize

DEDUCTIONS ADDED BACK FOR LTC SOC

5. Net  
itemize

4.

4. ABD income deductions  
(e.g., any income deduction)

6. Net  
itemize

5. Total unearned income  
(add 1 through 4)

5. Other income deductions

7. Net  
itemize

6. Deductions

6. Total deductions added back  
(add 4 and 5)

20

8. Net  
itemize

7. Countable unearned inc.  
(5 minus 6)

7. Total countable income  
(add 3 and 6)

400

9. Net  
itemize

B. NONEXEMPT EARNED INCOME

ALLOCATIONS AND DEDUCTIONS

10. Combined unearned inc.  
(add 7a and 7b)

400

8. Net earned income  
(MCO 175W, Part IV, Line 11)

8. Allocation from LTC/S&C  
Income (176W, Part III)

109

11. Net income deduction

-\$20

9. Subtotal countable  
income (add 7 and 8)

9. Allocation to excluded  
children (176W, Part I)

12. Countable unearned  
income (8 minus 9)

380

10. Child Support/  
Alimony paid.

10. Income to determine PA  
Eligibility

13. Net earned  
income

0

11. Total countable income  
(9 minus 10)

11. Health Insurance

14. Net  
itemize

12. Total allocations/deductions  
(add 8 through 11)

109

15. Net  
itemize

13. Total net nonexempt income  
(7 minus 12)

291

16. Combined earned inc.  
(add 13a and 13b)

14. Total net nonexempt income  
rounded

291

17. Net earned inc. deduction  
(add 13 minus 15)

15. Maintenance need

18. Net  
itemize

16. MFBU members not in LTC  
No.

19. Net  
itemize

17. MFBU members in LTC

• Personal needs  
• Upkeep of home  
• Needs of disabled dependents

20. Net countable inc.  
(add 10 and 17)

380

18. Total maintenance need  
(15a - 15b)

35

21. Net  
itemize

19. Share of cost  
(14 minus 15)

256

22. Net  
itemize

20. Underpayment adjustment

by Worker Signature/Computation Date

Worker Number

County Use

23. Adjusted Share of Cost  
(17 minus 18)

256



w Application <input type="checkbox"/> Redetermination <input type="checkbox"/> Change <input type="checkbox"/> Retroactive Elig. <input type="checkbox"/> Correction <input type="checkbox"/>				Effective Eligibility Date for this Budget			
State Number				Mo.		Yr.	
7 Digit Serial No.	MFBU No.	Pers. No.	Name - First, Middle, Last	Birthdate Mo. Day Yr.	Sex	(1) Social Security No. and (2) Health Insurance Claim No. or Railroad Retirement No.	Other Coverage
			ineligible at-home spouse			(1) ..... (2) .....	
						(1) ..... (2) .....	
						(1) ..... (2) .....	
						(1) ..... (2) .....	
						(1) ..... (2) .....	
						(1) ..... (2) .....	
						(1) ..... (2) .....	
						(1) ..... (2) .....	

me of MFBU members applying as aged, blind, disabled plus income of spouse or parent except PA or other PA)		II. Income of MFBU members not listed in I. (except PA or other PA)		III. Share of cost computation	
EXEMPT UNEARNED INCOME		A. NONEXEMPT UNEARNED INCOME		1. Countable Income from I 14	
a. ABD-MN	b. Spouse or Parent	1. OASDI		2. Countable Income from II 9	<del>0</del> 400
DI		2. Net Income from Property		3. Income allocated from LTC/B&C person to family members at home (176W, Part III)	
Income Property		3. Other-Itemize	400	4. Combined Countable Income (add 1, 2, and 3)	
Itemize		4. <del>Income</del>		ALLOCATIONS AND DEDUCTIONS	
		5. Total unearned Income (add 1 thru 4)	400	5. Allocation to excluded children (176W, Part I)	
1 thru 4)		B. NONEXEMPT EARNED INCOME		6. Income to determine PA Eligibility	
Counted unearned income (a and 5b)		6. Total Net Earned Income (MC 176W, Part IV, Line 11.)	<del>0</del>	7. Health Insurance	
Income deduction	-S20	C. TOTAL COUNTABLE INCOME		8.	
Countable unearned Income (a and 7)		7. Subtotal (add 5 and 6)		9.	
EXEMPT EARNED INCOME		8. Child Support/Alimony Paid		10. Total allocations/deductions (add 5 through 9)	
Earned	a.	9. Total Countable Income (7 minus 8)	400	11. Total net nonexempt Income (4 minus 10)	
Counted earned Income (a and 9b)		NOTE:		12. Total net nonexempt Income rounded	
Earned Inc. deduction		If there is income from which Educational Expenses are deducted (Section 50547), show calculations here. Enter net amount on line 3 or 4.		13. Maintenance need	
Unused S20		Total income for educational purpose		a. MFBU members not in LTC No.	
Under (10 minus 11)		Less total educational expenses		b. MFBU members in LTC	
Countable earned Income (12 by 2)		Net countable income		• Personal needs	
Countable Income (3 and 13)				• Upkeep of home	
				• Needs of disabled dependents	
				c. Total maintenance need (13a + 13b)	
				14. Share of cost (12 minus 13c)	
				15. Underpayment adjustment	
				16. Adjusted Share of Cost (14 minus 15)	

If the following deductions apply, complete Part VI before completing Column I:

Additional Expenses	Section 50547
Parent Support	Section 50541
Income Deduction	Section 50551
Plus 1/3	Section 50551.1
Expenses for the Blind	Section 50551.4
Expense for Self-Support	Section 50551.5

Countable Income

Worker Signature	Worker Number	Computation Date	County Use
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Name <u>Example 1</u>	
CHILDREN WITH SEPARATE INCOME OR PROPERTY EXCLUDED FROM THE MFBU NO. _____	
Maintenance need for MFBU plus excluded child(ren)	\$
Maintenance need for MFBU	\$
Excluded child(ren)'s share of maintenance need (line 1 minus line 2)	\$
Net nonexempt income of excluded child(ren)	\$
Allocation to excluded child(ren) (line 3 minus line 4)	\$
Enter above amount on MC 176 M, column III, line 5	

County Use	Date This Form Effective
Case Number	Number in MFBU

SSI/SSP OR IHSS RECIPIENT(S) IN FAMILY—INCOME AVAILABLE/ ALLOCATED		
SSI/SSP appropriate payment level minus IHSS authorization for IHSS (line 1)	\$	
Actual SSI/SSP payment minus IHSS payment	\$	
Net nonexempt income used to determine grant (or IHSS) (line 1 minus line 2)	\$	
Gross unearned income of SSI/SSP IHSS recipient (other than grant or IHSS payment)	\$	
SSI/SSP unearned income deductions and exemptions	\$	
Net nonexempt unearned income (line 4 minus line 5)	\$	
Gross earned income of SSI/SSP IHSS recipient	\$	
SSI/SSP earned income deductions and exemptions	\$	
Net nonexempt earned income (line 7 minus line 8)	\$	
Total net nonexempt income (add lines 6 and 9)	\$	
If line 10 is greater than line 3, the difference is income available to the MFBU and is entered here on MC 176 M, column I or II, line 3, as "PA- tient income available"		
If line 10 is less than line 3, the difference is the allocation to the SSI/SSP or IHSS recipient and entered here and on MC 176 M, column III, line 6.		

III. ALLOCATION FROM LTC OR BOARD AND CARE PERSON TO SPOUSE AND/OR CHILDREN AT HOME		
1. Maintenance need for spouse and/or children at home (other than excluded children)	\$ 509	
2. Total countable income of spouse and/or nonexcluded children	\$ 400	
3. Total allocations/deductions of spouse and/or nonexcluded children	\$ 0	
4. Total net nonexempt income of spouse and/or nonexcluded children (line 2 minus line 3)	\$ 400	
5. Unmet needs of spouse and/or nonexcluded children (line 1 minus line 5)	\$ 109	
6. Total countable income of person in LTC or board and care	\$ 400	
7. Health insurance for person in LTC or board and care	\$ 0	
8. Total net nonexempt income of person in LTC or board and care (line 6 minus line 7)	\$ 400	
9.	\$	
10. Maintenance need for person in LTC or board and care	\$ 35	
11. Total amount needed for maintenance (add lines 9 and 10)	\$ 35	
12. Amount available for allocation to spouse and/or children (line 8 minus line 11)	\$ 365	
13. Allocation to spouse and/or children (line 5 or line 12, whichever is less)	\$ 109	
A For share of cost determination of the ABD person or the spouse of the ABD person, enter above amount on MC 176 M, Column III, line 3		
B For share of cost determination of spouse and/or children at home, enter above amount on MC 176 M, column II, line 4		

Worker Signature	Worker Number	Date of Computation
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<b>EXAMPLE 2</b>				County District		County Use	
Application <input type="checkbox"/> Redetermination <input type="checkbox"/> Change <input type="checkbox"/> Retroactive Elig. <input type="checkbox"/> Correction <input type="checkbox"/>				Effective Eligibility Date for this Budget			
State Number				Mo.		Yr.	
7 Digit Serial No.		Name - First, Middle, Last		Birthdate Mo. Day Yr.		Sex	
Pers. MFBU No.						(1) Social Security No. and (2) Health Insurance Claim No. or Railroad Retirement No.	
		<b>LTC spouse</b>				Other Cover	
						(1) .....	
						(2) .....	
						(1) .....	
						(2) .....	
						(1) .....	
						(2) .....	
						(1) .....	
						(2) .....	
						(1) .....	
						(2) .....	
						(1) .....	
						(2) .....	
						(1) .....	
						(2) .....	

  

I. Income of MFBU members applying as aged, blind, or disabled plus income of spouse or other (except PA or other PA)		II. Income of MFBU members not listed in I. (except PA or other PA)		III. Share of cost computation	
<b>NONEXEMPT UNEARNED INCOME</b> a. ABD-MN Social Security Income from Property Other income Total (a 1 thru 4) Deductions Remainder (minus 6) Combined unearned inc. (a 7a and 7b) Unearned income deduction Unavailable unearned income (8 minus 9) <b>NONEXEMPT EARNED INCOME</b> Gross Earned Income Deductions Remainder (minus 12) Combined earned inc. (c 13a and 13b) Earned inc. deduction Remainder (minus 15) Available earned inc. (line 16 by 2) Total countable inc. (c 10 and 17)		<b>A. NONEXEMPT UNEARNED INCOME</b> 1. Social Security 2. Net Income from Property 3. Other-Itemize 4. 5. Total unearned income (add 1 through 4) 6. Deductions 7. Countable unearned inc. (5 minus 6) <b>B. NONEXEMPT EARNED INCOME</b> 8. Net earned income (MC 176W, Part IV, Line 11) 9. Subtotal countable income (add 7 and 8) 10. Child Support/Alimony paid 11. Total countable income (9 minus 10)		1. Countable income from I, 18 2. Countable income from II, 11 3. Total countable eligibility income (add 1 and 2) <b>DEDUCTIONS ADDED BACK FOR LTC SOC</b> 4. ABD income deductions (e.g., any income deduction) 5. Other income deductions 6. Total deductions added back (add 4 and 5) 7. Total countable income (add 3 and 6) <b>ALLOCATIONS AND DEDUCTIONS</b> 8. Allocation from LTC/B&C Income (176W, Part III) 9. Allocation to excluded children (176W, Part I) 10. Income to determine PA Eligibility 11. Health Insurance 12. Total allocations/deductions (add 8 through 11) 13. Total net nonexempt income (7 minus 12) 14. Total net nonexempt income rounded 15. Maintenance need a. MFBU members not in LTC No. b. MFBU members in LTC • Personal needs • Upkeep of home • Needs of disabled dependents c. Total maintenance need (15a + 15b) 16. Share of cost (14 minus 15) 17. Underpayment adjustment	
550 550 -520 520 550 520 530		530 0 530 4. 530 0 550 34 34 516 35 481		530 0 530 20 550 34 34 516 35 481	

Worker Signature/Computation Date: \_\_\_\_\_ Worker Number: \_\_\_\_\_ County Use: \_\_\_\_\_

w Application <input type="checkbox"/> Redetermination <input type="checkbox"/> Change <input type="checkbox"/> Retroactive Elig. <input type="checkbox"/> Correction <input type="checkbox"/>				Effective Eligibility Date for this Budget			
State Number				Mo. Yr.			
Id	7 Digit Serial No.	MFBU No.	Pers. No.	Name - First, Middle, Last	Birthdate Mo. Day Yr.	Sex	Other Coverage
				at-home spouse ineligible			(1) Social Security No. and (2) Health Insurance Claim No. or Railroad Retirement No.
							(1) ..... (2) .....
							(1) ..... (2) .....
							(1) ..... (2) .....
							(1) ..... (2) .....
							(1) ..... (2) .....
							(1) ..... (2) .....
							(1) ..... (2) .....

I. Income of MFBU members applying as aged, blind, disabled plus income of spouse or parent except PA or other PA			II. Income of MFBU members not listed in I. (except PA or other PA)			III. Share of cost computation		
<b>EXEMPT UNEARNED INCOME</b>			<b>A. NONEXEMPT UNEARNED INCOME</b>			1. Countable Income from I 14		
	a. ABD-MN	b. Spouse or Parent	1. OASDI			2. Countable Income from II 9		
DI			2. Net Income from Property			3. Income allocated from LTC/B&C person to family members at home (176W, Part III)		
Income Property			3. Other-Itemize			4. Combined Countable Income (add 1, 2, and 3)		
r-Itemize			4. Community share 150			<b>ALLOCATIONS AND DEDUCTIONS</b>		
			5. Total unearned Income (add 1 thru 4)			5. Allocation to excluded children (176W, Part I)		
1 thru 4)						6. Income to determine PA Eligibility		
ined unearned income (5a and 5b)			<b>B. NONEXEMPT EARNED INCOME</b>			7. Health Insurance		
Income deduction	-S20		6. Total Net Earned Income (MC 176W, Part IV, Line 11.)	325*		8.		
table unearned Income (minus 7)			<b>C. TOTAL COUNTABLE INCOME</b>			9.		
<b>EXEMPT EARNED INCOME</b>			7. Subtotal (add 5 and 6)			10. Total allocations/deductions (add 5 through 9)		
Earned	a.	b.	8. Child Support/Alimony Paid			11. Total net nonexempt Income (4 minus 10)		
ined earned Income (9a and 9b)			9. Total Countable Income (7 minus 8)	475		12. Total net nonexempt Income rounded		
earned Inc. deduction unused S20			<b>NOTE:</b> If there is income from which Educational Expenses are deducted (Section 50547), show calculations here. Enter net amount on line 3 or 4.			13. Maintenance need		
inder (10 minus 11)			Total income for educational purpose _____ Less total educational expenses _____ Net countable income _____			a. MFBU members not in LTC No. _____ b. MFBU members in LTC • Personal needs • Upkeep of home • Needs of disabled dependents		
table earned Income (e 12 by 2)			4000 gross - 75 325 net*			c. Total maintenance need (13a + 13b)		
countable Income (and 13)						14. Share of cost (12 minus 13c)		
the following deductions apply, complete Part VI before completing Column I:						15. Underpayment adjustment		
ditional Expenses	Section 50547					16. Adjusted Share of Cost (14 minus 15)		
t Parent Support	Section 50541							
it Deduction	Section 50551							
us 1/3	Section 50551.1							
Expenses for the Blind	Section 50551.4							
e for Self-Support	Section 50551.5							

Worker Signature	Worker Number	Computation Date	County Use
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Example 2:

\$700      Unearned income received in the name of the LTC spouse\*

\$400      Earned income received by at home spouse who is not linked to a Medi-Cal program.

1.	Community Property Unearned Income of LTC Spouse	\$700
2.	Community Property Income of at home Spouse	\$400
	$\begin{array}{r} \$ \quad 400 \\ \text{Earned} \end{array} + \$ \begin{array}{r} -0- \\ \text{Unearned} \end{array}$	
3.	Total	\$1100
4.	Each Spouse's Interest	\$550**

\* entered LTC last month

\*\* at-home spouse's interest consists of \$400 earned and \$150 unearned

Name

Example 2

Case Number

Number in MFBU

**CHILDREN WITH SEPARATE INCOME OR PROPERTY EXCLUDED FROM THE MFBU NO. \_\_\_\_\_**

Maintenance need for MFBU plus excluded child(ren)	\$
Maintenance need for MFBU	\$
Excluded child(ren)'s share of maintenance need (line 1 minus line 2)	\$
Net nonexempt income of excluded child(ren)	\$
Allocation to excluded child(ren) (line 3 minus line 4)	\$

Enter above amount on MC 176 M, column III, line 5

**SSI/SSP OR IHSS RECIPIENT(S) IN FAMILY—INCOME AVAILABLE/ALLOTTED**

SSI/SSP appropriate payment level (plus IHSS authorization for IHSS only)	\$	
Actual SSI/SSP payment (or IHSS payment)	\$	
Net nonexempt income used to determine grant (or IHSS) (line 1 minus line 2)		\$
Gross unearned income of SSI/SSP or IHSS recipient (other than grant or IHSS payment)	\$	
SSI/SSP unearned income deductions and exemptions	\$	
Net nonexempt unearned income (line 4 minus line 5)	\$	
Gross earned income of SSI/SSP or IHSS recipient	\$	
SSI/SSP earned income deductions and exemptions	\$	
Net nonexempt earned income (line 7 minus line 8)	\$	
Total net nonexempt income (add lines 6 and 9)		\$
If line 10 is greater than line 3, the difference is income available to the MFBU and is entered here on MC 176 M, column I or II, line 3, as "PA recipient income available"		
If line 10 is less than line 3, the difference is the allocation to the SSI/SSP or IHSS recipient and entered here and on MC 176 M, column III, line 6.		

**III. ALLOCATION FROM LTC OR BOARD AND CARE PERSON TO SPOUSE AND/OR CHILDREN AT HOME**

1. Maintenance need for spouse and/or children at home (other than excluded children)	\$	509
2. Total countable income of spouse and/or nonexcluded children	\$	475
3. Total allocations/deductions of spouse and/or nonexcluded children	\$	
4. Total net nonexempt income of spouse and/or nonexcluded children (line 2 minus line 3)	\$	475
5. Unmet needs of spouse and/or nonexcluded children (line 1 minus line 4)	\$	34
6. Total countable income of person in LTC or board and care	\$	550
7. Health insurance for person in LTC or board and care	\$	
8. Total net nonexempt income of person in LTC or board and care (line 6 minus line 7)	\$	550
9.	\$	
10. Maintenance need for person in LTC or board and care	\$	35
11. Total amount needed for maintenance (add lines 9 and 10)	\$	35
12. Amount available for allocation to spouse and/or children (line 8 minus line 11)	\$	515
13. Allocation to spouse and/or children (line 5 or line 12, whichever is less)	\$	34
A For share of cost determination of the ABD person or the spouse of the ABD person, enter above amount on MC 176 M, Column III, line 3		
B For share of cost determination of spouse and/or children at home, enter above amount on MC 176 M, column II, line 4		

By Worker Signature

Worker Number

Date of Computation

<input type="checkbox"/> New Application <input type="checkbox"/> Redetermination <input type="checkbox"/> Change <input type="checkbox"/> Retroactive Elig. <input type="checkbox"/> Correction				Effective Eligibility Date for this Budget			
State Number		Mo.		Yr.			
7 Digit Serial No.	Pers. MFBU No.	Name - First, Middle, Last		Birthdate Mo. Day Yr.	Sex	(1) Social Security No. and (2) Health Insurance Claim No. or Railroad Retirement No.	Other Covered
		LTC spouse				(1) .....	
						(2) .....	
						(1) .....	
						(2) .....	
						(1) .....	
						(2) .....	
						(1) .....	
						(2) .....	
						(1) .....	
						(2) .....	
I. Income of MFBU members applying as aged, blind, or disabled plus income of spouse or parent (except PA or other PA)		II. Income of MFBU members not listed in I. (except PA or other PA)		III. Share of cost computation			
NONEXEMPT UNEARNED INCOME		A. NONEXEMPT UNEARNED INCOME		1. Countable income from I, 1B			
a. ABD-MN	b. Spouse or Parent	1. Social Security		2. Countable income from II, 11			
2. Net Income from Property		2. Other—itemize		3. Total countable eligibility income (add 1 and 2)			
3. Total unearned income (add 2 through 4)		DEDUCTIONS ADDED BACK FOR LTC SOC					
4. Deductions		4. ABD income deductions (e.g., any income deduction)				+\$20	
5. Total unearned income (add 3 through 4)		5. Other income deductions					
6. Deductions		6. Total deductions added back (add 4 and 5)					
7. Countable unearned inc. (5 minus 6)		7. Total countable income (add 3 and 6)					
B. NONEXEMPT EARNED INCOME		8. Allocation from LTC/B&C Income (176W, Part III)					
8. Net earned income (MC 176W, Part IV, Line 11)		9. Allocation to excluded children (176W, Part I)					
9. Subtotal countable income (add 7 and 8)		10. Income to determine PA Eligibility					
10. Child Support/Alimony paid		11. Health Insurance					
11. Total countable income (9 minus 10)		12. Total allocations/deductions (add 8 through 11)					
13. Total net nonexempt income (7 minus 12)		14. Total net nonexempt income rounded					
15. Maintenance need		a. MFBU members not in LTC No.					
b. MFBU members in LTC		• Personal needs					
		• Upkeep of home					
		• Needs of disabled dependents					
c. Total maintenance need (15a + 15b)		16. Share of cost (14 minus 15)					
17. Underpayment adjustment		18. Adjusted Share of Cost (17 minus 16)					

Worker Signature	Worker Number	Computation Date	County Use
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NAME <u>Example 3</u>			County Use	Date This Form Effective
CHILDREN WITH SEPARATE INCOME OR PROPERTY EXCLUDED FROM THE MFBU NO. _____			Case Number	Number In MFBU
Maintenance need for MFBU plus excluded child(ren)	\$			
Maintenance need for MFBU	\$			
Excluded child(ren)'s share of maintenance need (line 1 minus line 2)	\$			
Net nonexempt income of excluded child(ren)	\$			
Allocation to excluded child(ren) (line 3 minus line 4)	\$			
Enter above amount on MC 176 M, column III, line 5				
<b>II. SSI/SSP OR IHSS RECIPIENT(S) IN FAMILY—INCOME AVAILABLE/LOCATED</b>			<b>III. ALLOCATION FROM LTC OR BOARD AND CARE PERSON TO SPOUSE AND/OR CHILDREN AT HOME</b>	
SSI/SSP appropriate payment level (IHSS authorization for IHSS only)	\$		1. Maintenance need for spouse and/or children at home (other than excluded children)	\$ <u>509</u>
Actual SSI/SSP payment (IHSS payment)	\$		2. Total countable income of spouse and/or nonexcluded children	\$ <u>507</u>
Net nonexempt income used to determine grant (or IHSS) (line 1 minus line 2)	\$		3. Total allocations/deductions of spouse and/or nonexcluded children	\$
Gross unearned income of SSI/SSP IHSS recipient (other than net or IHSS payment)	\$		4. Total net nonexempt income of spouse and/or nonexcluded children (line 2 minus line 3)	\$ <u>507</u>
SSI/SSP unearned income deductions and exemptions	\$		5. Unmet needs of spouse and/or nonexcluded children (line 1 minus line 5)	\$ <u>2</u>
Net nonexempt unearned income (line 4 minus line 5)	\$		6. Total countable income of person in LTC or board and care	\$ <u>480</u>
Gross earned income of SSI/SSP IHSS recipient	\$		7. Health insurance for person in LTC or board and care	\$
SSI/SSP earned income deductions and exemptions	\$		8. Total net nonexempt income of person in LTC or board and care (line 6 minus line 7)	\$ <u>480</u>
Net nonexempt earned income (line 7 minus line 8)	\$		9.	\$
Total net nonexempt income (add lines 6 and 9)	\$		10. Maintenance need for person in LTC or board and care	\$ <u>35</u>
If line 10 is greater than line 3, the difference is income available to the MFBU and is entered here on MC 176 M, column I or II, line 3, as "Patient income available"	\$		11. Total amount needed for maintenance (add lines 9 and 10)	\$ <u>35</u>
If line 10 is less than line 3, the difference is the allocation to the SSI/SSP or IHSS recipient and is entered here and on MC 176 M, column III, line 6.	\$		12. Amount available for allocation to spouse and/or children (line 8 minus line 11)	\$ <u>445</u>
Worker Signature			13. Allocation to spouse and/or children (line 5 or line 12, whichever is less)	\$ <u>2</u>
Worker Number			A For share of cost determination of the ABD person or the spouse of the ABD person, enter above amount on MC 176 M, Column III, line 3 B For share of cost determination of spouse and/or children at home, enter above amount on MC 176 M, column II, line 4	
			Date of Computation	

Example 4:

\$700      Unearned income is received in the name of the LTC spouse\*

\$865      Gross earned income is received from at-home spouse's employment\*\*

\$120      Unearned income is received by the couple's 17 year old disabled child.

The entire family wants Medi-Cal.

1.	Community Property Unearned Income of LTC Spouse	\$700
2.	Community Property Income of at-home Spouse $\$ \frac{865}{\text{earned}} + \frac{-0-}{\text{unearned}}$	\$865
3.	Total	\$1565
4.	Each Spouse's Interest	\$782.50

\* entered LTC last month

\*\* This spouse is AFDC-MN on the basis of the incapacitated parent deprivation for the disabled child.

Example 4

County District

County Use

ew Application ☐ Redetermination ☐ Change ☐ Retroactive Elig. ☐ Correction

Effective Eligibility Date for this Budget

Mo.

Yr.

State Number

Aid	7 Digit Serial No.	MFBU No.	Pers.	Name - First, Middle, Last	Birthdate Mo. Day Yr.	Sex	(1) Social Security No. and (2) Health Insurance Claim No. or Railroad Retirement No.	Other Coverage
				LTC spouse			(1) ..... (2) .....	
							(1) ..... (2) .....	
							(1) ..... (2) .....	
							(1) ..... (2) .....	
							(1) ..... (2) .....	
							(1) ..... (2) .....	
							(1) ..... (2) .....	
							(1) ..... (2) .....	
							(1) ..... (2) .....	

ome of MFBU members applying as aged,  
nd, or disabled plus income of spouse or  
ent (except PA or other PA)

II. Income of MFBU members not listed in I.  
(except PA or other PA)

III. Share of cost computation

NONEXEMPT UNEARNED INCOME

A. NONEXEMPT UNEARNED INCOME

1. Countable income from I, 18

	2. ABD-MN	3. Spouse or Parent	1. Social Security	2. Net Income from Property	3. Other—itemize	4. Total unearned income (add 1 through 4)	5. Deductions	6. Countable unearned inc. (5 minus 6)
ocial Security	700							
Income om Property								
ther— imize								
(2) ss 2 thru 4)								
ductions								
mainder (minus 6)								
combined unearned inc. (ss 7a and 7b)	700							
ty income deduction	—\$20							
ountable unearned ome (8 minus 9)	680							

2. Countable income from II, 11

3. Total countable eligibility  
income (add 1 and 2)

DEDUCTIONS ADDED BACK FOR LTC SOC

4. ABD income deductions  
(e.g., any income deduction)

5. Other income deductions

6. Total deductions added back  
(add 4 and 5)

7. Total countable income  
(add 3 and 6)

ALLOCATIONS AND DEDUCTIONS

8. Allocation from LTC/S&C  
Income (176W, Part III)

9. Allocation to excluded  
children (176W, Part I)

10. Income to determine PA  
Eligibility

11. Health Insurance

12. Total allocations/deductions  
(add 8 through 11)

13. Total net nonexempt income  
(7 minus 12)

14. Total net nonexempt income  
rounded

15. Maintenance need

a. MFBU members not in LTC  
No.

b. MFBU members in LTC  
• Personal needs  
• Upkeep of home  
• Needs of disabled dependents

c. Total maintenance need  
(15a + 15b)

16. Share of cost  
(14 minus 15)

17. Underpayment adjustment

NONEXEMPT EARNED INCOME

B. NONEXEMPT EARNED INCOME

	2.	3.	10. Child Support/ Alimony paid.	11. Total countable income (9 minus 10)
oss Earned ome ductions				
mainder (minus 12)				
combined earned inc. (d 13a and 13b)				
5 earned inc. deduction (15 minus 15a)				
mainder (minus 15)				
ountable earned inc. (16 minus 16a)				
12 countable inc. (d 10 and 17)				

EMPT INCOME

Worker Signature/Contribution Date

Worker Number

County Use

Application

Redetermination

Change

Retroactive Elig.

Correction

Effective Eligibility Date for this Budget

State Number

Mo.

Yr.

7 Digit Serial No.

MFBU No.

Pers.

Name - First, Middle, Last

Birthdate

Sex

(1) Social Security No. and (2) Health Insurance Claim No. or Railroad Retirement No.

Other Coverage

at home spouse

child

(1)

(2)

(1)

(2)

(1)

(2)

(1)

(2)

(1)

(2)

(1)

(2)

(1)

(2)

me of MFBU members applying as aged, blind, disabled plus income of spouse or parent except PA or other PA)

II. Income of MFBU members not listed in I. (except PA or other PA)

III. Share of cost computation

EXEMPT UNEARNED INCOME

a. ABD-MN

b. Spouse or Parent

DI

Income Property

Income Itemize

1 thru 4)

Unearned income (a and 5b)

Income deduction

Countable unearned Income (a and 7)

120

120

S20

100

A. NONEXEMPT UNEARNED INCOME

1. OASDI

2. Net Income from Property

3. Other-Itemize

4.

5. Total unearned Income (add 1 thru 4)

6. Total Net Earned Income (MC 176W, Part IV, Line 11.)

7. Subtotal (add 5 and 6)

8. Child Support/Alimony Paid

9. Total Countable Income (7 minus 8)

B. NONEXEMPT EARNED INCOME

6. Total Net Earned Income (MC 176W, Part IV, Line 11.)

7. Subtotal (add 5 and 6)

8. Child Support/Alimony Paid

9. Total Countable Income (7 minus 8)

C. TOTAL COUNTABLE INCOME

7. Subtotal (add 5 and 6)

8. Child Support/Alimony Paid

9. Total Countable Income (7 minus 8)

NOTE:

If there is income from which Educational Expenses are deducted (Section 50547), show calculations here. Enter net amount on line 3 or 4.

Total income for educational purpose

Less total educational expenses

Net countable income

EXEMPT EARNED INCOME

a.

b.

Unearned Income (a and 9b)

Unearned Inc. deduction (unused S20)

Under (10 minus 11)

Countable earned Income (e 12 by 2)

Countable Income (a and 13)

800

65

800

400

300

the following deductions apply, complete Part VI before completing Column I:

ditional Expenses

Parent Support

nt Deduction

us 1/3

Expenses for the Blind

e for Self-Support

Section 50547

Section 50541

Section 50551

Section 50551.1

Section 50551.4

Section 50551.5

13. Maintenance need

a. MFBU members not in LTC No.

b. MFBU members in LTC

- Personal needs
- Upkeep of home
- Needs of disabled dependents

c. Total maintenance need (13a + 13b)

14. Share of cost (12 minus 13c)

15. Underpayment adjustment

16. Adjusted Share of Cost (14 minus 15)

Worker Signature

Worker Number

Computation Date

County Use

Name <b>Example 4</b>	County Use	Date This Form Effective
	Case Number	Number In MFBU

**CHILDREN WITH SEPARATE INCOME OR PROPERTY EXCLUDED ON THE MFBU NO.**

Maintenance need for MFBU plus excluded child(ren)	\$
Maintenance need for MFBU	\$
Excluded child(ren)'s share of maintenance need (line 1 minus line 2)	\$
Net nonexempt income of excluded child(ren)	\$
Allocation to excluded child(ren) (line 3 minus line 4)	\$
Enter above amount on MC 176 M, column III, line 5	

**SSI/SSP OR IHSS RECIPIENT(S) IN FAMILY—INCOME AVAILABLE/ALLOCATED**

SSI/SSP appropriate payment level (plus IHSS authorization for IHSS family)	\$	
Actual SSI/SSP payment (or IHSS payment)	\$	
Net nonexempt income used to determine grant (or IHSS) (line 1 minus line 2)	\$	
Gross unearned income of SSI/SSP IHSS recipient (other than net or IHSS payment)	\$	
SSI/SSP unearned income deductions and exemptions	\$	
Net nonexempt unearned income (line 4 minus line 5)	\$	
Gross earned income of SSI/SSP IHSS recipient	\$	
SSI/SSP earned income deductions and exemptions	\$	
Net nonexempt earned income (line 7 minus line 8)	\$	
Total net nonexempt income (add lines 6 and 9)	\$	
If line 10 is greater than line 3, the difference is income available to the MFBU and is entered here on MC 176 M, column I or II, line 3, as "PA recipient income available"		
If line 10 is less than line 3, the difference is the allocation to the SSI/SSP or IHSS recipient and entered here and on MC 176 M, column III, line 6.		

**III. ALLOCATION FROM LTC OR BOARD AND CARE PERSON TO SPOUSE AND/OR CHILDREN AT HOME**

1. Maintenance need for spouse and/or children at home (other than excluded children)	\$	634
2. Total countable income of spouse and/or nonexcluded children	\$	500
3. Total allocations/deductions of spouse and/or nonexcluded children	\$	
4. Total net nonexempt income of spouse and/or nonexcluded children (line 2 minus line 3)	\$	500
5. Unmet needs of spouse and/or nonexcluded children (line 1 minus line 5)	\$	134
6. Total countable income of person in LTC or board and care	\$	700
7. Health insurance for person in LTC or board and care	\$	
8. Total net nonexempt income of person in LTC or board and care (line 6 minus line 7)	\$	700
9.	\$	
10. Maintenance need for person in LTC or board and care	\$	35
11. Total amount needed for maintenance (add lines 9 and 10)	\$	35
12. Amount available for allocation to spouse and/or children (line 8 minus line 11)	\$	665
13. Allocation to spouse and/or children (line 5 or line 12, whichever is less)	\$	134
A For share of cost determination of the ABD person or the spouse of the ABD person, enter above amount on MC 176 M, Column III, line 3		
B For share of cost determination of spouse and/or children at home, enter above amount on MC 176 M, column II, line 4		

Worker Signature	Worker Number	Date of Computation
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w Application <input type="checkbox"/> Redetermination <input type="checkbox"/> Change <input type="checkbox"/> Retroactive Elig. <input type="checkbox"/> Correction				County District	County Use	
State Number		Effective Eligibility Date for this Budget		Mo.	Yr.	
7 Digit Serial No.	Pers. MFBU No.	Name - First, Middle, Last	Birthdate	Sex	(1) Social Security No. and (2) Health Insurance Claim No. or Railroad Retirement No.	Other Coverage
		LTC spouse			(1) (2)	
					(1) (2)	
					(1) (2)	
					(1) (2)	
					(1) (2)	
					(1) (2)	
					(1) (2)	
					(1) (2)	
					(1) (2)	
I. Income of MFBU members applying as aged, d, or disabled plus income of spouse or m (except PA or other PA)		II. Income of MFBU members not listed in I. (except PA or other PA)		III. Share of cost computation		
NONEXEMPT UNEARNED INCOME		A. NONEXEMPT UNEARNED INCOME		1. Countable income from I, 18		
2. AED-MN	D. Spouse or Parent	1. Social Security		2. Countable income from II, 11	480	
3. Income from Property		2. Net Income from Property		3. Total countable eligibility income (add 1 and 2)	480	
4. Other income		3. Other - itemize		DEDUCTIONS ADDED BACK FOR LTC SOC		
5. Total unearned income (add 2 thru 4)		4.		4. AED income deductions (e.g., any income deduction)	4520	
6. Deductions		5. Total unearned income (add 1 through 4)		5. Other income deductions		
7. Countable unearned inc. (5 minus 6)		6. Deductions		6. Total deductions added back (add 4 and 5)	20	
8. Combined unearned inc. (7a and 7b)	520	7. Countable unearned inc. (5 minus 6)		7. Total countable income (add 3 and 6)	500	
9. Income deduction	-520	B. NONEXEMPT EARNED INCOME		ALLOCATIONS AND DEDUCTIONS		
10. Countable earned income (8 minus 9)	480	8. Net earned income (MC 176W, Part IV, Line 11)		8. Allocation from LTC/B&C Income (176W, Part III)	0	
NONEXEMPT EARNED INCOME		9. Subtotal countable income (add 7 and 8)		9. Allocation to excluded children (176W, Part I)		
10. Countable earned income	0	10. Child Support/Alimony paid		10. Income to determine PA Eligibility		
11. Total countable income (9 minus 10)		11. Total countable income (9 minus 10)		11. Health Insurance		
12. Total countable income (9 minus 10)				12. Total allocations/deductions (add 8 through 11)		
13. Total net nonexempt income (7 minus 12)				13. Total net nonexempt income (7 minus 12)		
14. Total net nonexempt income rounded				14. Total net nonexempt income rounded	500	
15. Maintenance need				15. Maintenance need		
16. Share of cost (14 minus 15)				16. Share of cost (14 minus 15)	465	
17. Underpayment adjustment				17. Underpayment adjustment		
18. Adjusted Share of Cost (17 minus 18)				18. Adjusted Share of Cost (17 minus 18)		
Worker Signature/Computation Date		Worker Number		County Use		

Application <input type="checkbox"/> Redetermination <input type="checkbox"/> Change <input type="checkbox"/> Retroactive Elig. <input type="checkbox"/> Correction <input type="checkbox"/>				Effective Eligibility Date for this Budget			
State Number			Name — First, Middle, Last		Birthdate	Sex	Mo. Yr.
7 Digit Serial No.	MFBU No.	Pers. No.			Mo. Day Yr.		
			at-home spouse				(1) Social Security No. and (2) Health Insurance Claim No. or Railroad Retirement No.
			ineligible				Other Coverage
							(1) (2)
							(1) (2)
							(1) (2)
							(1) (2)
							(1) (2)
							(1) (2)
							(1) (2)
							(1) (2)

I. Income of MFBU members applying as aged, blind, disabled plus income of spouse or parent (except PA or other PA)			II. Income of MFBU members not listed in I. (except PA or other PA)		III. Share of cost computation	
EXEMPT UNEARNED INCOME			A. NONEXEMPT UNEARNED INCOME		1. Countable Income from I 14	
	a. ABD—MN	b. Spouse or Parent	1. OASDI		2. Countable Income from II 9	€
DI			2. Net Income from Property		3. Income allocated from LTC/B&C person to family members at home (176W, Part III)	700
Income Property			3. Other—Itemize		4. Combined Countable Income (add 1, 2, and 3)	
Itemize			com. prop. share 500		ALLOCATIONS AND DEDUCTIONS	
			4. inheritance 200		5. Allocation to excluded children (176W, Part I)	
1 thru 4)			5. Total unearned Income (add 1 thru 4)	700	6. Income to determine PA Eligibility	
Unearned income (a and 5b)			B. NONEXEMPT EARNED INCOME		7. Health Insurance	
Income deduction	-520		6. Total Net Earned Income (MC 176W, Part IV, Line 11.)	€	8.	
Countable unearned Income (minus 7)			C. TOTAL COUNTABLE INCOME		9.	
EXEMPT EARNED INCOME			7. Subtotal (add 5 and 6)		10. Total allocations/deductions (add 5 through 9)	
Earned Income	a.	b.	8. Child Support/Alimony Paid		11. Total net nonexempt Income (4 minus 10)	
Combined earned Income (9a and 9b)			9. Total Countable Income (7 minus 8)	700	12. Total net nonexempt Income rounded	
Earned Inc. deduction (unused \$20)			NOTE:		13. Maintenance need	
Under (10 minus 11)			If there is income from which Educational Expenses are deducted (Section 50547), show calculations here. Enter net amount on line 3 or 4.		a. MFBU members not in LTC No.	
Countable earned Income (12 by 2)			Total income for educational purpose		b. MFBU members in LTC	
Countable Income (3 and 13)			Less total educational expenses		• Personal needs	
			Net countable income		• Upkeep of home	
					• Needs of disabled dependents	
					c. Total maintenance need (13a + 13b)	
					14. Share of cost (12 minus 13c)	
					15. Underpayment adjustment	
					16. Adjusted Share of Cost (14 minus 15)	

If the following deductions apply, complete Part VI before completing Column I:

Additional Expenses	Section 50547
Parent Support	Section 50541
Income Deduction	Section 50551
Plus 1/3	Section 50551.1
Expenses for the Blind	Section 50551.4
Expenses for Self-Support	Section 50551.5

Countable Income

Worker Signature	Worker Number	Computation Date	County Use
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Name Example 5

CHILDREN WITH SEPARATE INCOME OR PROPERTY EXCLUDED FROM THE MFBU NO. \_\_\_\_\_

County Use \_\_\_\_\_

Case Number \_\_\_\_\_

Date This Form Effective \_\_\_\_\_

Number In MFBU \_\_\_\_\_

Maintenance need for MFBU plus excluded child(ren)	\$
Maintenance need for MFBU	\$
Excluded child(ren)'s share of maintenance need (line 1 minus line 2)	\$
Net nonexempt income of excluded child(ren)	\$
Allocation to excluded child(ren) (line 3 minus line 4)	\$
Enter above amount on MC 176 M, column III, line 5	

I/SSP OR IHSS RECIPIENT(S) IN FAMILY—INCOME AVAILABLE/LOCATED	
SSI/SSP appropriate payment level (plus IHSS authorization for IHSS payment)	\$
Total SSI/SSP payment (plus IHSS payment)	\$
Net nonexempt income used to determine grant (or IHSS) (line 1 minus line 2)	\$
SSI unearned income of SSI/SSP recipient (other than net or IHSS payment)	\$
SSI unearned income deductions and exemptions	\$
Net nonexempt unearned income (line 4 minus line 5)	\$
SSI earned income of SSI/SSP recipient	\$
SSI earned income deductions and exemptions	\$
Net nonexempt earned income (line 7 minus line 8)	\$
Net nonexempt income (lines 6 and 9)	\$
If line 10 is greater than line 3, the difference is available to the MFBU and is entered here on MC 176 M, column I or II, line 3, as "Parent income available"	
If line 10 is less than line 3, the difference is the allocation to the SSI/SSP or IHSS recipient and entered here and on MC 176 M, column III, line 6.	

III. ALLOCATION FROM LTC OR BOARD AND CARE PERSON TO SPOUSE AND/OR CHILDREN AT HOME	
1. Maintenance need for spouse and/or children at home (other than excluded children)	\$ 509
2. Total countable income of spouse and/or nonexcluded children	\$ 700
3. Total allocations/deductions of spouse and/or nonexcluded children	\$
4. Total net nonexempt income of spouse and/or nonexcluded children (line 2 minus line 3)	\$ 700
5. Unmet needs of spouse and/or nonexcluded children (line 1 minus line 5)	\$ 5
6. Total countable income of person in LTC or board and care	\$
7. Health insurance for person in LTC or board and care	\$
8. Total net nonexempt income of person in LTC or board and care (line 6 minus line 7)	\$
9.	\$
10. Maintenance need for person in LTC or board and care	\$
11. Total amount needed for maintenance (add lines 9 and 10)	\$
12. Amount available for allocation to spouse and/or children (line 8 minus line 11)	\$
13. Allocation to spouse and/or children (line 5 or line 12, whichever is less)	\$
A For share of cost determination of the ABD person or the spouse of the ABD person, enter above amount on MC 176 M, Column III, line 3	
B For share of cost determination of spouse and/or children at home, enter above amount on MC 176 M, column II, line 4	

Worker Signature \_\_\_\_\_

Worker Number \_\_\_\_\_

Date of Computation \_\_\_\_\_